Enterprise Configuration Management Implementation (ECMI)
Summary of ECM Tool Modernization
Pilot Results
June 2002

Enterprise Change Management (ECM) Tool Pilot Overview

Results - ECM Tool Major Activities

Results - ECM Tool Internal Activities

Results – ECM Tool Customer Success

August 14, 2002

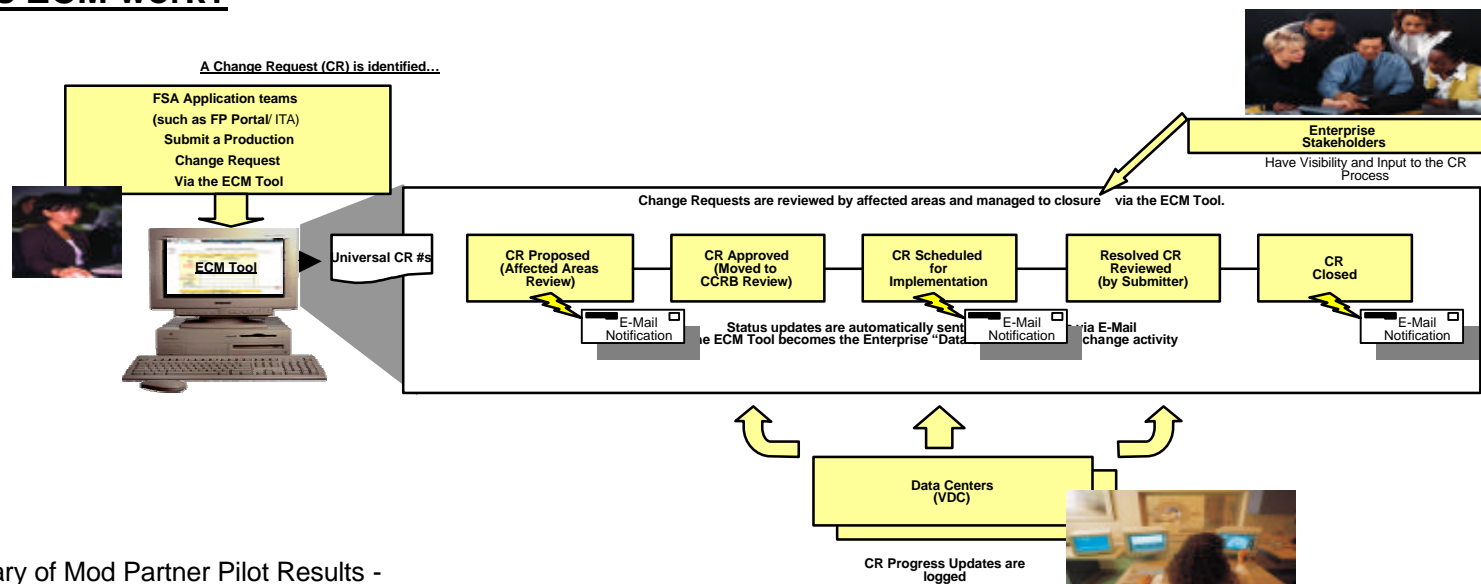# Enterprise Change Management (ECM) Tool Pilot Overview

FSA CIO sponsored the ECM Initiative to take the **first steps** to improve overall system integration across FSA through the use of a common Enterprise Change Management (ECM) process and tool to log, manage and track FSA's Change activities across Application Areas.

Why?

1. Diminish risk of outages due to lack of communication ("friendly fire")
2. Improve overall communication between Application Teams and Data Centers
3. Provide "Data of Record" for FSA Enterprise Level Change Request (CR) discussions and actions
4. Capture data to simplify and improve the process and internal controls
5. Application Teams have visibility to entire CR process
6. Infuses accountability into change management decisions
7. Provide visibility to extended stakeholders

How does ECM work?

A Change Request (CR) is identified…

FSA Application teams (such as FP Portal/ ITA) Submit a Production Change Request Via the ECM Tool

Enterprise Stakeholders
Have Visibility and Input to the CR Process

ECM Tool

Universal CR #s

Change Requests are reviewed by affected areas and managed to closure via the ECM Tool.

| CR Proposed (Affected Areas Review) | CR Approved (Moved to CCRB Review) | CR Scheduled for Implementation | Resolved CR Reviewed (by Submitter) | CR Closed |

E-Mail Notification

Status updates are automatically sent via E-Mail
The ECM Tool becomes the Enterprise "Data change activity

E-Mail Notification

E-Mail Notification

Data Centers (VDC)

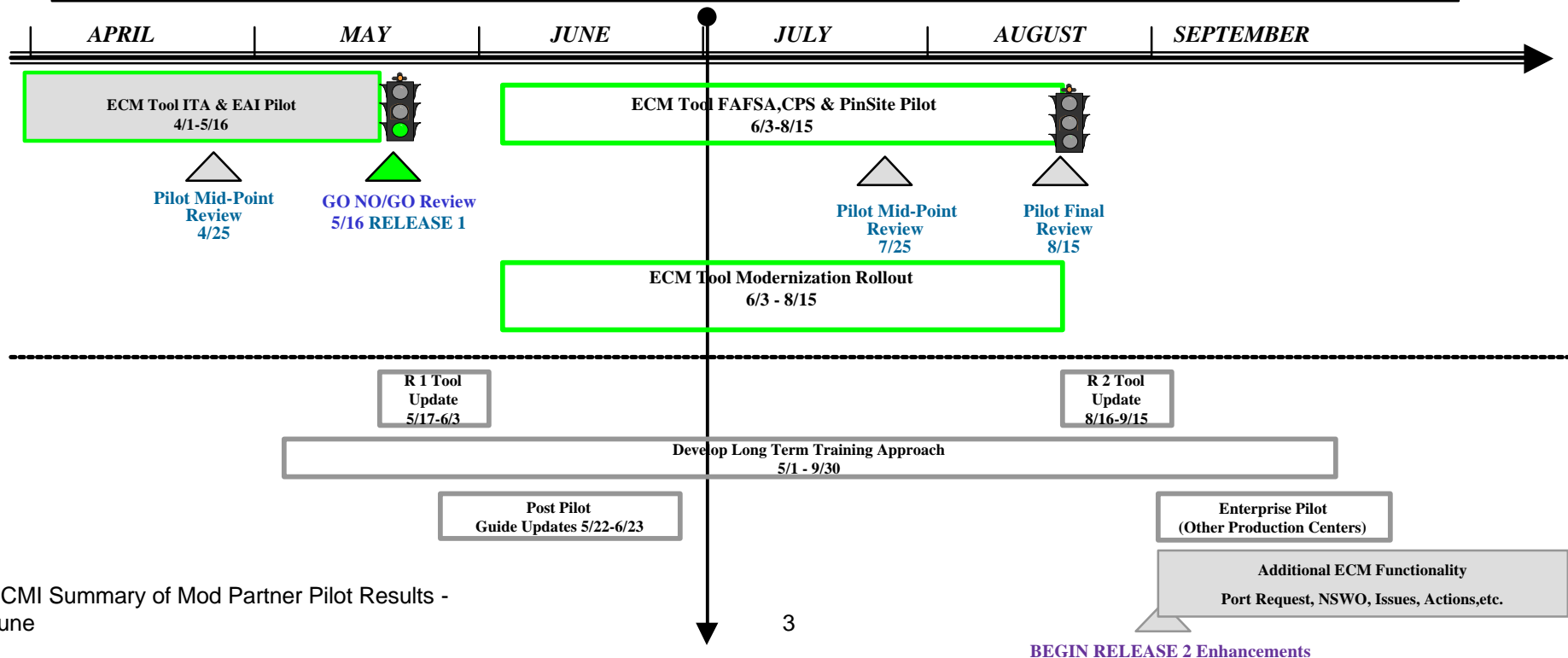CR Progress Updates are logged

Results - ECM Tool Major Activities

"After successfully completing the ECM Tool Pilot with the EAI & ITA Teams, the ECM Tool Effort received the 'Go' decision to take the next steps as shown in the Pilot Integrated Timeline"

Completed:
1. **ECM Tool Release 1 (ECM Tool R1)** became live on 6/1
2. **ECM Tool FAFSA, CPS & Pin Site Pilot** Kickoff Meeting was held on 6/3
3. **Modernization Partner Roll-out** Kickoff also was on 6/3, by beginning work with the FMS Application Team

Upcoming:
1. **FAFSA, CPS & Pin Site Mid-point Review Session** is scheduled for 7/25
2. **ECM Tool FAFSA, CPS & Pin Site Pilot** activities are scheduled to conclude on 8/15
3. **Modernization Partner Roll-out** activities are scheduled to be completed on 8/15
4. **FAFSA, CPS & Pin Site Final Review Session** is scheduled for 8/15

APRIL   *MAY*   *JUNE*   *JULY*   *AUGUST*   *SEPTEMBER*

ECM Tool ITA & EAI Pilot
4/1-5/16

ECM Tool FAFSA,CPS & PinSite Pilot
6/3-8/15

Pilot Mid-Point Review
4/25

GO NO/GO Review
5/16 RELEASE 1

Pilot Mid-Point Review
7/25

Pilot Final Review
8/15

ECM Tool Modernization Rollout
6/3 - 8/15

R 1 Tool Update
5/17-6/3

R 2 Tool Update
8/16-9/15

Develop Long Term Training Approach
5/1 - 9/30

Post Pilot Guide Updates 5/22-6/23

Enterprise Pilot (Other Production Centers)

Additional ECM Functionality
Port Request, NSWO, Issues, Actions,etc.

BEGIN RELEASE 2 Enhancements

Results - ECM Tool Internal Activities

"The ECM Tool has achieved results that directly improve internal communications, employee interaction and the ability of FSA CIO to meet customer needs and expectations"

Teams using the ECM Tool Submit Production and Development CRs to Datacenters (e.g. VDC)

Team	Production CRs submitted via ECM Tool	Development CRs submitted via ECM Tool
EAI	32	15
ITA	24	5
FAFSA	0	0
CPS	1	0
Pin Site	0	0
Other Teams – TBD	n/a	n/a
Total	57	20

The ECM Tool Change Control Group (CCG) continuously reviews and approves requested enhancements to the Tool

Total # Items Reviewed by ECM Tool CCG	46
Updates made for Release 1 (scheduled for 6/3)	16
Items Closed without updates	13
Items deferred for Release 2 (scheduled for 8/30) CCG	2

Repeatable, documented activities have been the roadmap for ECM success

e.g.

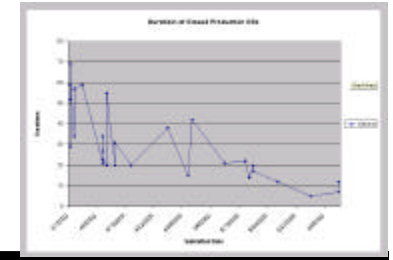| |
|---|
| 1. Communicate Pilot Information to Pilot Participants Stakeholders |
| 2. Provide ECM Tool Training to Pilot Participants |
| 3. Application Teams Enter Change Requests (CR) Into Tool |
| 4. Use and Review the ECM Tool Reports at VDC Coordination Meetings |
| 5. Review potential changes to the ECM Tool based on feedback at CCG meetings |
| 6. Conduct other support activities including User & Process Guide Updates and development of long term training materials |

Results – ECM Tool Customer Success

ECM Tool Rollout Progress Tracking Spreadsheet

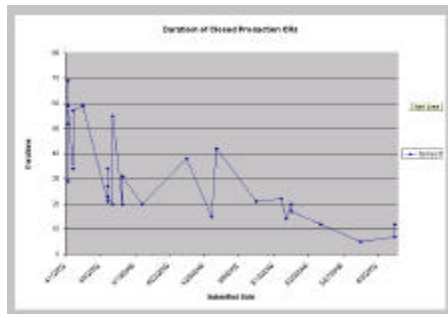|	Applications	Kickoff Date	Preparation Stage	Training Stage	Tool Use Stage	Support Stage
Modernization Production Systems						
1	ITA	1-Apr-02				
2	EAI	1-Apr-02				
3	FMS	17-Jun-02				
4	SAIG	17-Jun-02				
5	Rational Support	17-Jun-02				
6	Financial Partners Portal	27-Jun-02				
7	FP Data Mart	27-Jun-02				
8	CM Data Mart	27-Jun-02				
9	Students Portal	11-Jul-02				
10	IFAP	11-Jul-02				
11	Schools Portal	11-Jul-02				
Modernization Development Systems						
12	Lender Redesign	8-Jul-02				
Rollout Activities TBD						
13	COD	TBD				
14	eZ - Audit	TBD				
15	Consistent Answers	TBD				
16	eServicing	TBD				
Operating Partner Post-Pilot Activities						
17	FAFSA	8-Jun-02				
18	PIN Site	8-Jun-02				
19	CPS	8-Jun-02				
20	CBS	TBD				
21	DLOS	TBD				
22	DLSS	TBD				
23	FFEL	TBD				
24	NSLDS	TBD				
25	Ombudsmen	TBD				
26	PEPS	TBD				
FSA Applications						
27	Students.gov	TBD				
28	Policy Guidance DB	TBD				
29	FSA Coach	TBD				
30	Analysis PDD PGDS	TBD				
31	FSANet	TBD				
32	Ombud Intrnt Redesign	TBD				

Results - Metrics Reports

"If you don't measure, you're just practicing"

- OMB Director Mitch Daniels

ID	SYS	Prod or Dev	Count	Preloaded	Paper copy Sub.	Submitted	Proposed	CCRB Review	Scheduled	Resolved	Closed Successfully	Closed Rejected	Today's Date
						ECM Tool Production Change Request Metrics Report							
VDCMP00000266	EAI	Prod	1			3-Jun						5-Jun	26-Jun
VDCMP00000314	CPS	Prod	1			25-Jun							26-Jun
VDCMP00000277	EAI	Prod	1			6-Jun	14-Jun						26-Jun
VDCMP00000296	FAFSA	Prod	1			17-Jun	18-Jun						26-Jun
VDCMP00000299	EAI	Prod	1			18-Jun	24-Jun						26-Jun
VDCMP00000304	ITA	Prod	1			21-Jun	24-Jun						26-Jun
VDCMP00000305	ITA	Prod	1			21-Jun	24-Jun						26-Jun
VDCMP00000312	FMS	Prod	1			25-Jun	25-Jun						26-Jun
VDCMP00000187	EAI	Prod	1	1	7-Feb	1-Apr	12-Jun	12-Jun	20-Jun				26-Jun
VDCMP00000252	ITA	Prod	1			20-May	15-Jun	20-Jun	20-Jun				26-Jun
VDCMP00000191	EAI	Prod	1			2-Apr	14-Jun	20-Jun	24-Jun	24-Jun			26-Jun
VDCMP00000250	FAFSA	Prod	1			17-May	30-May	30-May	30-May	6-Jun			26-Jun
VDCMP00000297	EAI	Prod	1			18-Jun	18-Jun	20-Jun	25-Jun	25-Jun			26-Jun
VDCMP00000174	EAI	Prod	1	1	unknown	1-Apr	25-Apr	30-Apr	30-Apr	30-Apr	30-Apr		26-Jun
VDCMP00000175	EAI	Prod	1	1	14-Jan	1-Apr	16-May	16-May	23-May	23-May	23-May		26-Jun
VDCMP00000176	EAI	Prod	1	1	unknown	1-Apr	16-May	16-May	30-May	30-May	30-May		26-Jun
VDCMP00000179	EAI	Prod	1	1	unknown	1-Apr	16-May	16-May	29-May	30-May	30-May		26-Jun

Click here to review Metric Report:

ECM Tool CR June Metrics

Results - ECM Meetings

Regular ECM Meetings include the following:

1. **ECM Tool Status Meetings**

   7_9 ECM Tool status Meeting   7_16 ECM Tool Status Meeting   7_30 ECM Tool Status Meeting

2. **ECM Tool CCG Meetings**

   June CCG Enhancments Log

3. **ECM Tool Executive Review Sessions**

   ECM Exec Review Meeting Report